

October 18, 2010

TO: Electra Jubon, Council Representative
Washington Federation of State Employees (WFSE)

FROM: Teresa Parsons, SPHR
Director's Review Program Supervisor

SUBJECT: Jacquelyn Early v. Eastern Washington University (EWU)
Allocation Review Request ALLO-09-073

On August 12 and 18, 2010, I conducted a Director's review telephone conference regarding the allocation of Jacquelyn Early's position. You and Ms. Early both participated in the conference. Lori Kory, Human Resources Associate, represented EWU.

Director's Determination

This position review was based on the work performed for the six-month period of December 2, 2008, through June 2, 2009, the time period reviewed by EWU. As indicated by the parties, Ms. Early's position review was prompted by management's request that she completed a Position Questionnaire (PQ) in light of a layoff action separate from the position review that is the subject of this request. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Early's assigned duties and responsibilities, I conclude her position is properly allocated to the Program Specialist 2 classification.

Background

In June 2009, Ms. Early had been assigned to work in Career Services and reported to Robert Hille, Career Services Executive Director. On June 2, 2009, Mr. Hille verbally notified Ms. Early that her position was being eliminated for financial reasons as part of the university's budget reduction planning. The effective date of the layoff action occurred after EWU's allocation decision regarding Ms. Early's position. Around June 2009, an internal reorganization also occurred and Career Services became part of the Student Affairs Division. Although Ms. Early continued to report to Mr. Hille until his retirement on August 31, 2009, Career Services was in a transition period, and the duties assigned to her position

were changing. After Mr. Hille retired, Ms. Early reported to Virginia Hinch, Associate Director of Career Services, for a brief period in September 2009.

On October 1, 2009, Ms. Early met with Dorothy Zeisler-Vralsted, Vice President for Student Affairs. As a result of that meeting, Ms. Zeisler-Vralsted asked Ms. Early for clarification about her position's duties and responsibilities and provided her with a Position Questionnaire (PQ). Ms. Early completed and submitted the PQ to HR on October 23, 2009. Ms. Kory conducted a desk audit of Ms. Early's position, and Ms. Hinch completed the management portion of the PQ. Ms. Early's position review was prompted by the meeting she had with Ms. Zeisler-Vralsted (Exhibit A-4). EWU then made the decision to consider the work Ms. Early had performed from December 2, 2008, through June 2, 2009, as the audit and review period of her position (Exhibit B-10).

During the time period under review, Ms. Early performed duties related to the EagleAXIS system. The EagleAXIS system has been described as a hosted application (vendor supported system) for student employment, work study, internships, and volunteer opportunities on and off campus, and registration for career fair and other events (Exhibit B3h). Ms. Early had served as the primary point of contact for EagleAXIS since June 2008, when Symplicity Corporation, the third party vendor, purchased the previous campus recruiting system used in Career Services. After June 2009, Ms. Early continued to perform some clean up functions of files within EagleAXIS, but the focus of her work shifted to other duties that included general office work and organizing bills, travel, and other types of files.

On November 20, 2009, Ms. Kory issued her Job Audit Results and determined the EagleAXIS duties and responsibilities Ms. Early performed were in general conformance with the Program Specialist 2 classification. On December 18, 2009, Ms. Early requested a Director's Review of EWU's allocation determination.

Summary of Ms. Early's Perspective

Ms. Early asserts her position had been identified as the EagleAXIS Administrator and technical support person for those using the system. Ms. Early contends she was the person responsible for working directly with the vendor to troubleshoot issues. Ms. Early acknowledges that she referred higher level technical issues to Symplicity, as the vendor of the application, but points out complex issues were referred to the vendor because it was their program. Ms. Early states that she was the only individual from EWU to attend training on EagleAXIS when the university first began using the application, and she asserts she trained others on how to use the system. Ms. Early further indicates that she essentially served as the "help desk" for students, staff, and others using the system at EWU. Ms. Early contends she regularly exercised independent judgment when selecting criteria for user accounts. Ms. Early also contends she was instrumental in identifying equipment needs, licensing issues, and making recommendations about the system's capabilities to the Career Services Executive Director and Dean of Student Affairs. Ms. Early indicates that she also supervised a Program Coordinator position working with placement files in EagleAXIS during this time period. Ms. Early believes her position fits within the Information Technology series at either an ITS 2 or 3 level.

Summary of EWU's Reasoning

EWU acknowledges Ms. Early performed information technology related work to accomplish tasks within the EagleAXIS system. EWU also recognizes that Ms. Early performed some initial customizing of the forms used in the system to meet the needs of the university in 2008, prior to the time period under review. However, EWU contends Ms. Early formatted fields by using pre-defined standards and going through a series of items and selecting existing criteria based on the university's need. EWU emphasizes that Ms. Early's position had not been assigned responsibility for manipulating data, programming or configuring the application. Instead, EWU asserts Ms. Early's position had been tasked with maintaining the data integrity by verifying the information entered into the system.

EWU states that Ms. Early also verified information in the student information system (Banner) to ensure students were active and to verify identification numbers prior to approving accounts. EWU indicates that account authorization involved going through a series of fields and selecting existing options based on the type of user. EWU recognizes Ms. Early performed a significant amount of work cleaning up data in the system and forwarding issues and working with the vendor as the primary point of contact. However, EWU stresses that Ms. Early used the EagleAXIS technology to accomplish the program's work. EWU contends Ms. Early's position had not been assigned fundamental IT duties and responsibilities. Instead, EWU believes the Program Specialist 2 classification best describes the specialized, technical duties Ms. Early performed in support of the program.

Rationale for Director's Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Duties and Responsibilities

On the PQ, Ms. Early describes the majority of her duties (65%) as data integrity, planning and system support (Exhibit B-2). During the Director's review conference, Ms. Early explained that a significant portion of her work involved data clean up due to problems and issues that resulted from transferring existing records from the old system to the new EagleAXIS system. This is further supported by Ms. Kory's handwritten notes on the PQ indicating Ms. Early had been performing ongoing clean up triggered by user actions. For example, students previously had the ability to create more than one account. Additionally, once approved, employers had the ability to enter job posting information. Both parties explained that the system was new to Symplicity, as the vendor, which required troubleshooting and back and forth communication between EWU and Symplicity. Ms.

Early served as the primary point of contact for EWU and performed testing and troubleshooting as the end user of EagleAXIS.

As the primary point of contact, Ms. Early summarized issues she was having with the system or that had been reported to her by other users, and she captured that information in a Word document, which she uploaded to Symplicity using Symplicity's NACELink site created for that purpose (Exhibit B3i). Ms. Early also communicated via email to report and resolve issues (Exhibit B2m and B3m). Ms. Kory agreed that Ms. Early had been selected as the point of contact to funnel issues and report problems to Symplicity to avoid having multiple people contact Symplicity directly.

Ms. Early described her maintenance work with EagleAXIS as cleaning up data in the system to include checking for duplicate records, purging incomplete records, converting social security numbers of alumni records to student identification numbers, and verifying student account information by looking up information in Banner, the multidimensional Student Information System. Although the PQ references implementation, application, scheduling, and maintenance of Banner student data feeds, Ms. Early clarified those functions never occurred because she had still been in the process of cleaning up the system. She explained that the Banner feeds were to occur in the future once the data in the system was clean.

The PQ also references the creation of EagleAXIS accounts and verification and approval of employer accounts. Ms. Early explained that she verified student information in Banner, such as name and student identification number and whether or not the student was still active. For employer accounts, Ms. Early indicated that she verified the employer contact information to ensure it was legitimate. She also verified that individuals completed data fields correctly. After Ms. Early approved an account, she authorized the level of permission for each user based on certain criteria. For example, she may authorize a user to have read only capability.

When performing the above functions, Ms. Early selected user settings that had already been pre-defined in the system. She determined what functions needed to be activated to use EagleAXIS in the way EWU intended. She also determined what options to include in drop down boxes (described as creating pick lists) based on specific customer needs and the level of use authorized for particular users. However, Ms. Early's position did not have responsibility for programming the hosted application. Symplicity retained responsibility for developing, programming, maintaining, and upgrading the EagleAXIS software application and hardware.

EWU had responsibility for maintaining the data in the system. Once programming changes were implemented, Ms. Early's position managed the data in the system by focusing on data integrity, ensuring the account data was accurate and complete and that no duplicate or partial records existed in the system. Ms. Early ensured the protection of student data including student IDs, grades, unofficial transcripts, and class schedules, which students had the ability to upload to their EagleAXIS accounts. She also purged records of students

no longer affiliated with EWU, fraudulent postings, and records containing credit card information from users signing up for events through EagleAXIS.

Under the planning duties described on the PQ, Ms. Early clarified that much of the planning work had been in the preliminary stages because she had still been focusing on data integrity to ensure the system was clean before implementing other features such as Banner data feeds. Another item in the planning stages was the ability to go live with online chatting; however, that function never occurred. While Ms. Early had gathered information and provided input about using system capabilities in other modules, she indicated that Mr. Hille had responsibility for making decisions about how Career Services used EagleAXIS. Ms. Early noted that the kiosk system used to sign in at Career Services events by swiping EWU identification cards had been implemented during the time relevant to this review. She indicated there was some involvement with EWU's IT Department in setting up the card swipe technology using EWU identification numbers. Ms. Early stated that she had previously registered participants at events using a laptop connected to a printer. With the kiosk, Ms. Early was able to generate reports of those attending events based on the cards that had been swiped.

It is undisputed Ms. Early's position had been referred to as the Administrator of EagleAXIS. However, Ms. Early indicated that another position in Career Services backed up her position as well. Ms. Early had substantial knowledge about how to use the EagleAXIS application for the services offered in Career Services, and she described her role as a "super user." I recognize there is a help desk component to the work she performed because she assisted students, staff, and employers in using the system. She also served as the primary point of contact between EWU and Symplicity in troubleshooting issues from an end user standpoint. However, Ms. Early had not been assigned technical administrative responsibilities relating to programming, maintenance, and technical support of the application itself. Symplicity handled the technical resolution for problems with the application software.

Class Specifications

When comparing the assignment of work and level of responsibility to the available class specifications, the class series concept (if one exists) followed by definition and distinguishing characteristics are primary considerations.

The **Information Technology Specialist class series concept** reads as follows:

Positions in this category perform professional information technology systems and/or applications support for client applications, databases, computer hardware and software products, network infrastructure equipment, or telecommunications software or hardware.

This category broadly describes positions in one or more information technology disciplines such as: Application Development And Maintenance, Application Testing, Capacity Planning, Business Analysis and/or Process Re-

Engineering, Data Base Design And Maintenance, Data Communications, Disaster Recovery/Data Security, Distributed Systems/LAN/WAN/PC, Hardware Management And Support, Network Operations, Production Control, Quality Assurance, IT Project Management, Systems Software, Web Development, or Voice Communications.

Positions which perform information technology-related work to accomplish tasks but are non-technical in nature would not be included in this occupational category.

The **Information Technology Specialist 1 definition** includes the following:

In support of information systems and users, performs routine analysis, programming, installation, maintenance and/or systems support. Diagnoses and resolves low-risk problems using pre-determined methods on computer or telecommunication software and/or hardware, or applications running in stand alone, client/server, web-based, and/or networked environments. Priorities are set by others and many non-routine problems are referred to a higher level or to another support group for resolution. Positions work under close supervision and work is oriented toward productivity, skill development, and development of professional judgment.

The primary focus of Ms. Early's position is not Information Technology (IT). At the time relevant to this review, Ms. Early had been assigned to Career Services where the overall focus of her position had been to support students, staff, alumni, employers, and others using the EagleAXIS system in support of student employment and other services offered in Career Services. I recognize that much of her work involved using the application hosted by Symplicity. She had a lot of knowledge about how to navigate the system and best utilize its features to accomplish program functions.

I also recognize there are technical aspects to the work she performed. However, when considering the overall class series concept, Ms. Early's position had not been tasked with supporting the application itself. The technical support, maintenance, programming, and upgrades to the system were handled by Symplicity as the vendor of the hosted application. While she did work to resolve technical issues, the majority of the email examples she provided demonstrated that she forwarded issues to Symplicity reported by users and then passed along the technical resolution she received from Symplicity. Overall, the majority of Ms. Early's duties involved the performance of information technology-related work to accomplish tasks in support of the Career Services Program. Therefore, allocation to the IT series is not the best fit.

Both the **Program Support Supervisor 1 and 2 definitions** include supervising support staff involved in the performance of duties associated with highly specialized or technical programs and acting as a liaison between programs and outside organizations. At the Program Support Supervisor 1 level, positions coordinate the operations of the program, while at the Program Support Supervisor 2 level, they assist in the development of program

policies and budgets. Although Ms. Early supervised one position, her position did not have responsibility for assisting in the development of program policies and budgets. Some of Ms. Early's duties align with the Program Support Supervisor 1 distinguishing characteristics, which include devising and implementing new procedures, exercising independent judgment in interpreting and applying rules and regulations, and independently advising students and program participants regarding program activities. However, the Program Specialist 2 classification provides a better fit for the duties and responsibilities assigned to Ms. Early's position. The class series concept states, in part, the following:

Positions in this series coordinate discrete, specialized programs consisting of specific components and tasks that are unique to a particular subject and are separate and distinguished from the main body of an organization. Positions coordinate program services and resources; act as a program liaison and provide consultation to program participants and outside entities regarding functions of the program; interpret, review and apply program specific policies, procedures and regulations; assess program needs; and develop courses of action to carry out program activities. Program coordination also requires performance of tasks and application of knowledge unique to the program and not transferable or applicable to other areas of the organization.

In addition, the **Program Specialist 2 definition** includes planning, organizing, directing, and coordinating operations for programs; overseeing day-to-day program operations; functioning as the program representative and resource; having extensive contact with program participants and outside entities, and resolving problems within a delegated area of authority.

While examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification. The Program Specialist 2 typical work examples that most align with Ms. Early's duties and responsibilities include providing information and technical assistance to program participants; attending conferences as the program representative; participating in establishing program standards and identifying areas for program development; and monitoring program activities in relation to established program goals. The typical work also includes supervising lower level staff.

During the time period relevant to this review, Ms. Early had responsibility for coordinating and overseeing the data records relating to student employment and placement within Career Services at EWU. She also worked with registering participants at Career Services events. To accomplish this work, Ms. Early used the EagleAXIS hosted application. A significant portion of her job included the clean up of existing records and maintaining the data integrity of newly created records. She also verified information created by users of the system for authenticity. As a super user, functional administrator and technical assistant, she assisted program participants in navigating the system and creating the records needed to facilitate student employment and other services offered through Career Services.

I recognize Ms. Early's specialized knowledge regarding EagleAXIS. A position's allocation does not diminish the quality of work performed and is not a reflection of performance. Rather, an allocation is based on the majority of work assigned to a position. The Program Specialist 2 classification is the best fit for the overall duties and responsibilities assigned to Ms. Early's position.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 600 South Franklin, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 753-0139.

If no further action is taken, the Director's determination becomes final.

c: Jacquelyn Early
 Lori Kory, EWU
 Lisa Skriletz, DOP

Enclosure: List of Exhibits

Jacquelyn Early v. Eastern Washington University

ALLO-09-073

List of Exhibits

A. Jacquelyn Early Exhibits

1. Request for Director's Review Form December 18, 2009
2. Statement of reason for request
3. Employer Allocation letter dated November 20, 2009
4. October 16, 2009 memo to Ms. Early from Dorothy Zeisler-Vralsted, Vice President for Student Affairs providing opportunity for Ms. Early to complete Position Questionnaire (PQ). (for reference – requested by Teresa Parsons)

B. Eastern Washington University cover letter with exhibit list attached.

1. Position Questionnaire (PQ) submitted by Ms. Early, including handwritten notes from Lori Kory, HR.
2. Exhibits attached to the Position Questionnaire as submitted by Ms. Early. (Includes exhibits that were not considered by EWU – as noted. --These were requested by Teresa Parsons because they were referenced in other documents and made it easier to follow. For reference only).
 - a. May 13, 2008 email from Symplicity to Ms. Early regarding steps to go live with Career Services Manager (CSM) for EagleAXIS. (**Not considered by EWU** – outside timeframe; reference only).
 - b. Document written by Ms. Early entitled "Eagle AXIS Administrator – Mission Critical justification. " requested by Dorothy Zeisler-Vralsted
 - c. October 20, 2009 email from Virginia Hinch to Bruce Defrates re: EagleAXIS (**Not considered by EWU** – outside timeframe; reference only).
 - d. Email from Michael Astle, Student Technology Fee Committee, to Ms. Early – June 5, 2009
 - e. Student Affairs Newsletter (2 pages) – Spring 2009, referencing Ms. Early's position.
 - f. Career Services Staff – 8/13/2009 print date – referencing Ms. Early's position.
 - g. Email inbox screen shot from eagle Axis email account – July to August 2009
 - h. Email outbox screen shot showing list of email sent to a vendor, Symplicity December 2008 to September 2009
 - i. Additional sent email - outbox
 - j. May 12, 2008 email from Symplicity to Ms. Early providing initial instructions on accessing CSM (**Not considered by EWU** – outside timeframe; reference only).
 - k. October 6, 2008 email from Ms. Early to Greg Crary regarding Kiosk project (**Not considered by EWU** – outside timeframe; reference only).
 - l. Email from Virginia Hinch to Kelly Cullen – 4/29/2009 regarding issues with EagleAXIS and future linking to Banner
 - m. Multiple email communications to and from Ms. Early – May 2008 to June 2009.

3. Additional documentation considered by EWU

- a. Web screen shot from Symplicity's public website providing an overview of what the simplicity system does.
- b. Copy from Symplicity's Security Standards manual, outlining Symplicity's roles and responsibilities, pages 2 – 10
- c. Web screen shots showing how a form is created within Eastern's Eagle AXIS system
- d. Web screen shot showing how a "pick list" is created within Eagle AXIS
- e. Symplicity's instructions showing how to create a new account, pages 1-4
- f. Symplicity's instructions showing how to set up an interview ("OCR Setup"), pages 1-3
- g. Symplicity's instructions showing how to create a job posting, pages 1-3
- h. Symplicity's users guide, "How to use this manual," pages 5,6,8,9,11,12
- i. Symplicity information/advisory update, "reminder New Support Model Launches January 12, 2009," pages 1-10
- j. Symplicity's instructions showing how to upload student records, page 1
- k. Handwritten instructions showing how to print transcripts out of Eastern's Banner student information system ("Banner")
- l. Typed instructions showing how to extract data from Banner
- m. Emails related to requests for technical support – February 2009 to June 2009
- n. Emails related to training – March 2009 to May 2009
- o. Other documents related to training – undated

4. Manager's Statement – Part of the PQ

5. Exhibits attached to Manager's Statement – in support of EWU's characterization of Ms. Early's duties:

- a. Email from Symplicity – 10/29/2009
- b. Web screen shot from Symplicity extranet showing problems reported by EWU
- c. Email from Al Thompson to Ms. Early, et al – 7/22/2009
- d. Web screen shot from the vendor NaceLink's home page
- e. Email from Symplicity to Virginia Hinch – 11/2/2009, plus related pages from Symplicity manual showing how to report issues, pages 1-2 (3 pages total)
- f. Email from Symplicity to Krista Benson – 9/15/2009
- g. Flier from NaceLink

6. Class Specifications:

- a. Program Coordinator
- b. Program Specialist 2
- c. Program Specialist 3
- d. Information Technology Specialist 1
- e. Information Technology Specialist 2
- f. Information Technology Specialist 3

7. Notes Taken by Lori Kory during interviews with Ms. Early on 11/9/2009 and 11/10/2009

8. Notes Taken by Lori Kory during interview with Virginia Hinch on 11/9/2009
 9. Analysis sent to the Vice President of Student Affairs, Dorothy Zeisler-Vralsted-11/13/2009
 10. EWU's allocation decision - notice provided to Ms. Early and to Ms. Jubon-11/20/2009
 11. Position Description – 2005
 12. Career Services Organizational Chart – July 2009
- C. Email correspondence between Teresa Parsons and the parties after the conference regarding additional exhibits.